

# MONTANA WELCOMES THE WORLD

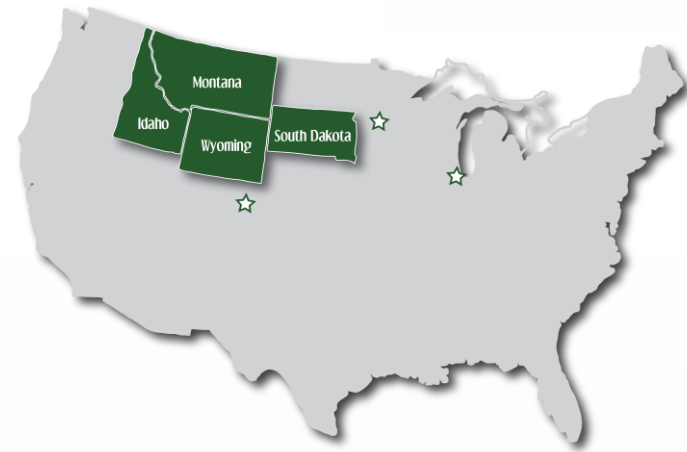
## INTERNATIONAL MARKETING IN: EUROPE, SCANDINAVIA, AUSTRALIA & NEW ZEALAND

2013 Montana Governor's Conference on Tourism  
March 24-26, 2013



# About RMI

- Founded in 1990
- Contracted international inbound tourism marketing company for the state tourism departments of Montana, Idaho, South Dakota and Wyoming



# Target Markets

## Regional Tourism Promotion in Eight International Markets:

1. United Kingdom
2. Germany, Switzerland, Austria
3. France
4. Italy
5. Benelux (Belgium, Netherlands, Luxembourg)
6. Scandinavia (Norway, Denmark, Sweden, Finland)
7. Australia
8. New Zealand

# Gateway City Program

- The RMI states work closely with a network of Gateway Cities that are exciting destinations and provide easy access to the region



# Marketing Partners

- Marketing Partners are region private sector suppliers who support RMI's marketing efforts and want maximum exposure in the international community





# Receptive Operators

- The purpose is to identify and work in partnership with qualified, professional, and experienced receptive tour operators who specialize in the RMI region for individual and group travel



# Why International?

- In 2011, arrivals increased 3% to a record **62 million**
- Arrivals are expected to grow 5-6% annually during the next 5 years
- International visitors spent more than \$134.4 billion in 2010 and then \$152.4 billion in 2011 good for a 13% increase
- Almost 59% of all international visitors visit “non-traditional” destinations outside the 10 major destinations (NY, CA, FL, NV, HA, IL, MA Guam, TX, NJ)



Source: U.S. Dept. of Commerce, ITA, Office of Travel & Tourism Industries

# Why International?

## 2011 Overseas Arrivals

<u>Rank</u>	<u>Country of Residence</u>	<u>Number of Arrivals</u>	<u>% Change</u>
1	United Kingdom, Ireland	4,182,179	0%
2	Japan	3,249,569	-4%
3	Germany, Switzerland, Austria	2,479,781	11%
4	Brazil	1,508,279	26%
5	France	1,504,182	12%
6	South Korea	1,145,216	3%
7	China	1,089,405	36%
8	Scandinavia (Sweden, Denmark, Norway, Finland)	1,083,618	11%
9	Australia, New Zealand	1,272,592	12%
10	Italy	891,571	6%
11	Benelux (Netherlands, Belgium)	860,503	4%



# Why Europe?

- 5-6 weeks of vacation time
- 16 annual paid public holidays
- Spend an average of \$1,982 per trip to the U.S.
- Stay for 14 days
- Visit during "shoulder" or off-peak seasons than domestic travelers and are willing to visit "off-the-beaten-path" rural attractions and destinations
- Our challenges (lack of population, rural access) are often viewed as benefits to a world seeking out green and open destinations
- The value of the Euro against the U.S. dollar currently makes the U.S. very affordable for many visitors

# Why Scandinavia?

- Scandinavian visitation projected to surpass 1 million in 2012
- The U.S. is ranked in the top three travel destinations
- Spend an average of \$3,222 per person, per trip
- 6-8 weeks of vacation time and average one major long-haul vacation every 18 months
- Scandinavians immigrated to our part of the U.S. in record numbers and love tracing their ancestors to the Real America
- Largest disposable income in Europe

# Why Australia?

- Visitation projected to surpass 1 million in 2012
- The U.S. is considered a dream vacation for most Australians.
- Australians are known for their very active lifestyle and they are looking for “active” vacations.
- Los Angeles and San Francisco now rate Australia as their #1 inbound visitation market

# FY12 RMI TRIP Reports

Total Overnights Offered by Tour Operator / Market

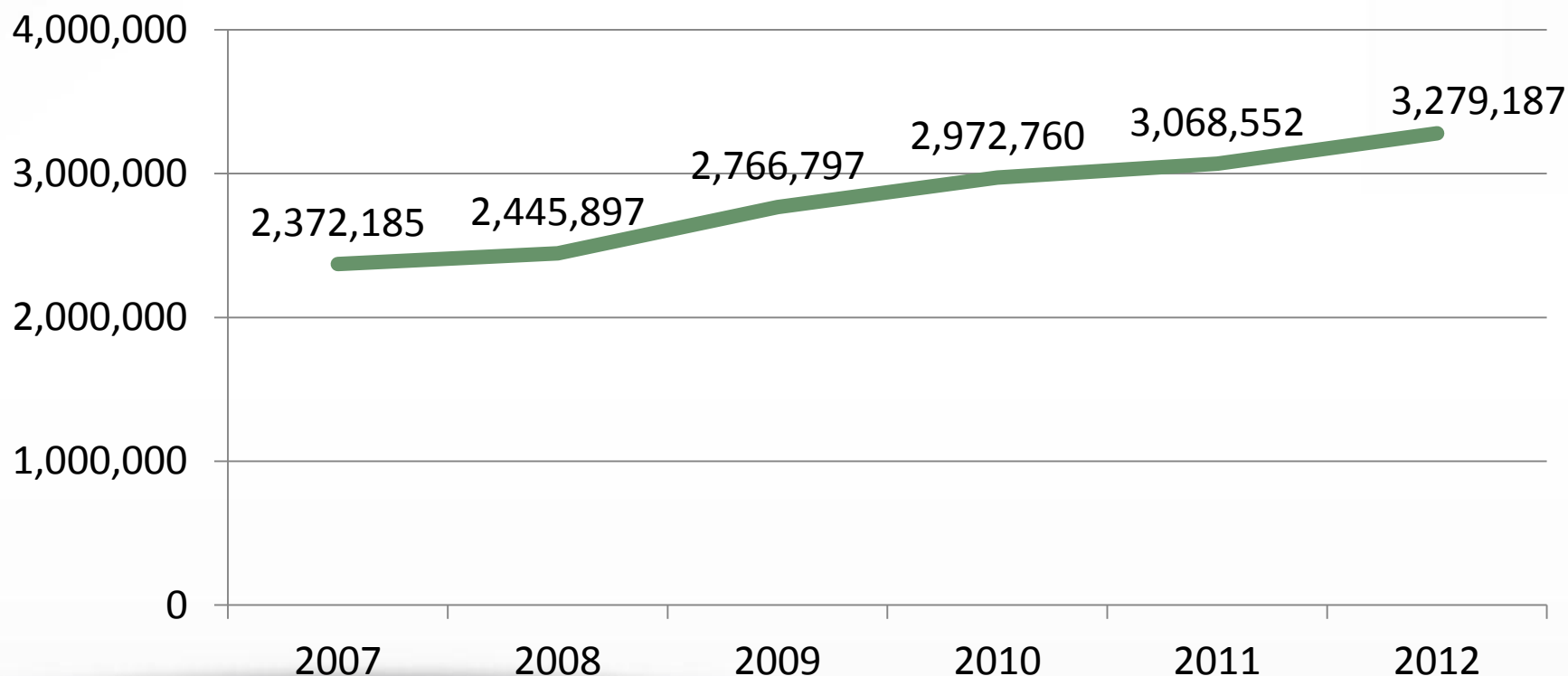
	Fly-Drive	Accommodation	Motorcoach	Small Group	Packages
Benelux	180,653	205,787	159,520	9,779	4,820
France	75,300	226,957	60,680	50,220	36,560
Germany	144,905	159,067	139,000	23,195	21,920
Italy	69,810	536,623	290,480	16,644	17,254
United Kingdom	90,884	149,942	476,400	51,737	81,050
<b>TOTAL</b>	<b>561,552</b>	<b>1,278,376</b>	<b>1,126,080</b>	<b>151,575</b>	<b>161,604</b>

	2010/2011	2011/2012	Change	Percentage
Benelux	486,872	560,559	73,687	15%
France	440,665	449,717	9,052	2%
Germany	560,855	488,087	-72,768	-13%
Italy	842,448	930,811	88,363	10%
United Kingdom	737,712	850,013	112,301	15%
<b>TOTAL</b>	<b>3,068,552</b>	<b>3,279,187</b>	<b>210,635</b>	<b>7%</b>

**Increase: +21  
0,635  
+7%**

# Six Year Product Growth

## Total Overnights



# Montana State Product Growth

Overnights Offered by Tour Operator / Market

	Fly-Drive	Accommodation	Motorcoach	Small Group	Packages
Benelux	48,636	60,006	22,720	1,606	567
France	13,690	55,699	13,760	5,310	10,400
Germany	39,789	39,274	25,480	4,270	6,448
Italy	18,420	162,060	100,200	2,838	3,557
United Kingdom	25,023	44,895	56,080	8,248	21,679
<b>TOTAL</b>	<b>145,558</b>	<b>361,934</b>	<b>218,240</b>	<b>22,272</b>	<b>42,651</b>

	2010/2011	2011/2012	Change	Percentage
Benelux	111,989	133,535	21,546	19%
France	97,959	98,859	900	1%
Germany	103,959	115,261	11,302	11%
Italy	254,249	287,075	32,826	13%
United Kingdom	148,773	155,925	7,152	5%
<b>TOTAL</b>	<b>716,929</b>	<b>790,655</b>	<b>73,726</b>	<b>10%</b>

Increase:  
**+73,726**  
**+10%**



# State Product Growth Comparisons

Overnights Offered by Tour Operator / State

RMI State Comparisons	FY11	FY12	Change	% Change
IDAHO	301,650	317,285	15,635	5%
<b>MONTANA</b>	<b>716,929</b>	<b>790,655</b>	<b>73,726</b>	<b>10%</b>
SOUTH DAKOTA	494,047	542,588	48,541	10%
WYOMING	1,555,926	1,628,659	72,733	5%
TOTAL	3,068,552	3,279,187	210,635	7%

# Real America Guide

- UK & Germany
  - Distribution: 70,000
  - Readership: 168,000
- France & Italy
  - Distribution: 5,000 each
- Australia & New Zealand
  - Distribution: 5,000
- Scandinavia
  - Distribution: 5,000



# Montana Guide Book

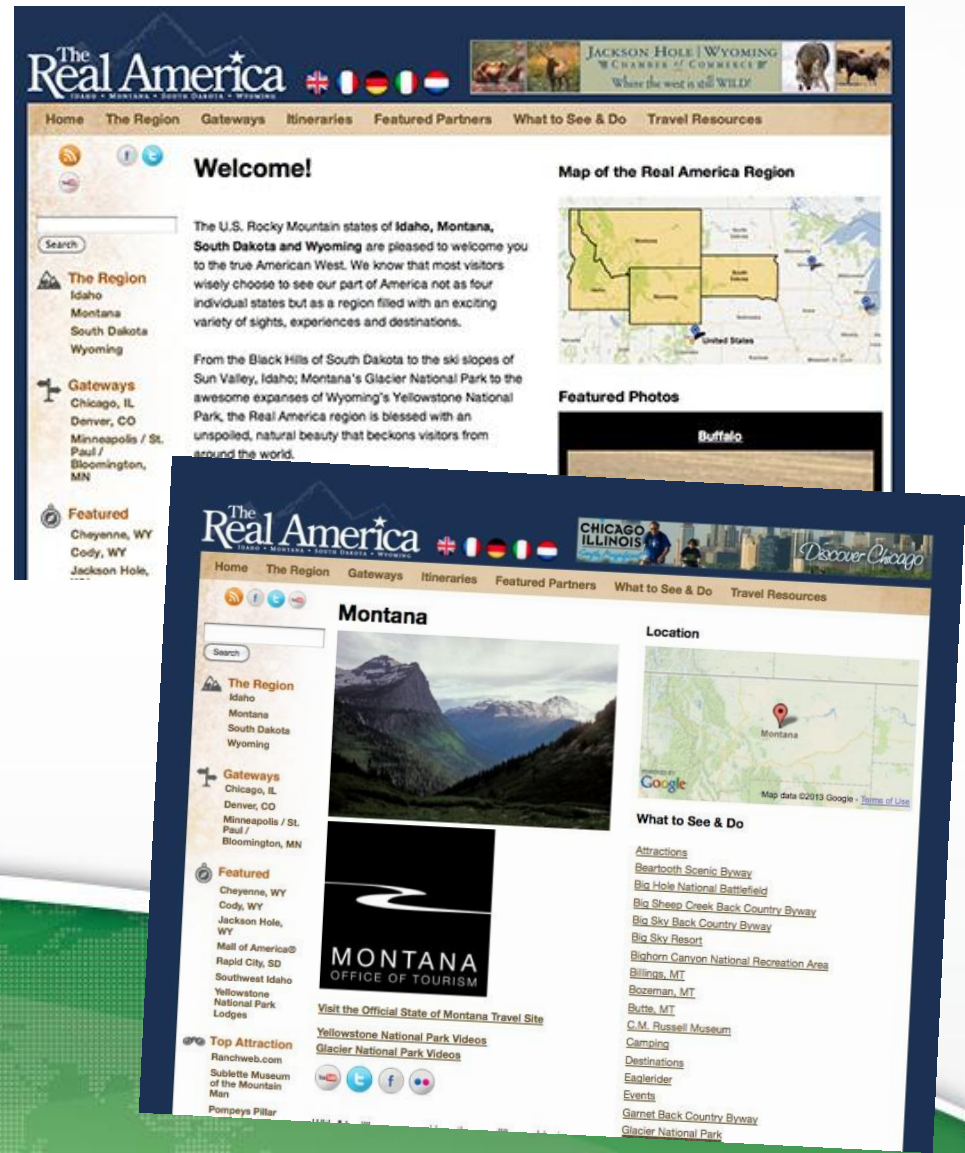
- New Translated Guide
  - French
  - Italian
  - German
- 2,500 Printed in Each Language





# On the Web

- [www.RMI-RealAmerica.com](http://www.RMI-RealAmerica.com)
- [www.RMI-RealAmerica.de](http://www.RMI-RealAmerica.de)
- [www.RMI-RealAmerica.nl](http://www.RMI-RealAmerica.nl)
- [www.RMI-RealAmerica.fr](http://www.RMI-RealAmerica.fr)
- [www.RealAmerica.it](http://www.RealAmerica.it)
- [www.RMI-RealAmerica.fi](http://www.RMI-RealAmerica.fi)
- [www.RMI-RealAmerica.se](http://www.RMI-RealAmerica.se)
- [www.RMI-RealAmerica.no](http://www.RMI-RealAmerica.no)
- [www.RMI-RealAmerica.dk](http://www.RMI-RealAmerica.dk)
- [www.RMI-RealAmerica.au](http://www.RMI-RealAmerica.au)



# On the Web

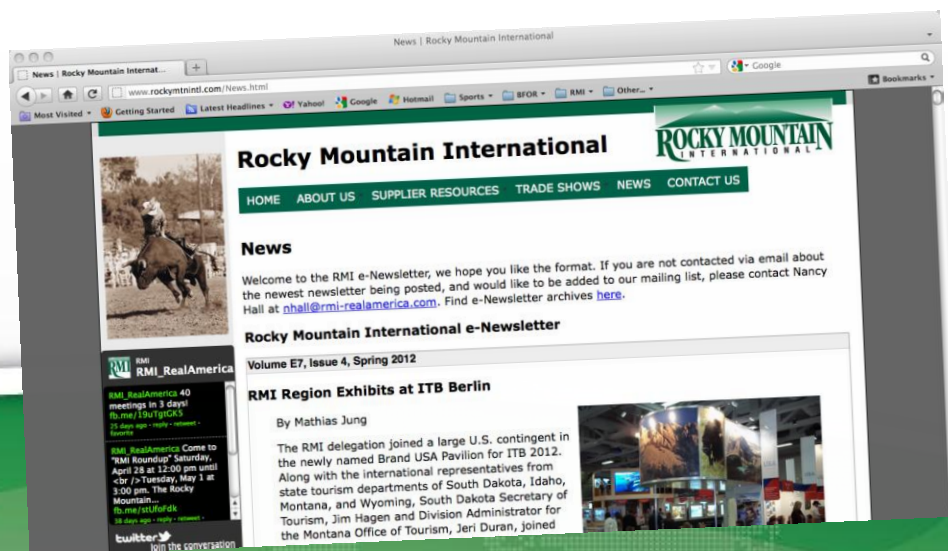
- [www.RockyMtnIntl.com](http://www.RockyMtnIntl.com)

- Intl Marketing 101
- Inbound Statistics
- Show Recaps
- Helpful Articles
- Advertising Options
- Market Trends
- TRIP Reports
- Glossary of Terms
- Fam Tours
- Marketing Calendar



# RMI e-Newsletter

2012	Qty	Bounces	% Bounces	Opens	% Opens	Clicks	% Clicks
Dec. 21	4,369	192	4.4%	872	20.9%	79	9.1%
Sept. 26	4,538	261	5.8%	937	21.9%	144	15.4%
June 21	4,531	215	4.7%	859	19.9%	31	3.6%
March 30	4,502	155	3.4%	909	20.9%	69	7.6%
<b>TOTAL</b>	<b>17,940</b>	<b>823</b>	<b>4.6%</b>	<b>3,577</b>	<b>20.9%</b>	<b>323</b>	<b>8.9%</b>





# Mega Fam

September 7-15, 2012

- Montana and South Dakota
- 4-day tour of southeast Montana
- 33 European Tour Operators, Travel Agents & US Receptives
  - Italy – 7
  - Benelux – 7
  - France – 6
  - UK – 3
  - Germany, Switzerland, Austria – 8
  - US - 2



# TTG Incontri

## October 18-20, 2012

- Rimini, Italy
- Most important B2B event in Italian travel industry
- Attracts Over 35,000 Italian Agents, Operators and Buyers
- 28 Trade & Media Leads Produced for Montana



# WTM & UK Training

November 5-8, 2012

- London, UK
- One of the largest travel trade shows in the world, and the largest in the UK, with over 5,000 exhibitors and about 47,700 visitors
- 46 Trade and Media Leads Produced for Montana





# Scandinavian Mission

January 10-20, 2013

- Oslo, Norway; Bergen, Norway; Helsinki, Finland
- 104 Trade and Media leads produced for Montana



# Upcoming Events for FY13

- Australian Mission
  - Perth, Sydney, Melbourne, Brisbane
  - February 9-20, 2013
- ITB
  - Berlin
  - March 6-10, 2013
- French Mission
  - Paris, Toulouse
  - March 10-15, 2013
- RMI Roundup
  - Boise, ID
  - April 9-12, 2013
- International Pow Wow
  - Las Vegas, NV
  - June 8-12, 2013
- Numerous Consumer and VUSA Events



# Brand USA

- **Essentially America Magazine -**

- Distribution 100,000 in Daily Mail, United Kingdom, plus World Travel Market distribution (one of World's largest tradeshow)

- RMI co-op ad

- **Co-op marketing and in-kind contributions planned for future**



Discover  
America  
.com





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### American Parks Trail (2013/14)

**10 day tour from US\$295.00\***

Tour Type: **Premium Tour**

Brochure Type: USA & Canada 2013/14

Like Tweet +1

Summary	Itinerary	Highlights	Options	Gallery	Prices & Dates
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The map shows a circular travel itinerary across five states: Montana, Wyoming, Idaho, Utah, and New Mexico. Key locations marked include Glacier House, Yellowstone National Park, Grand Teton National Park, Jackson Hole, Snake River Canyon, Capitol Reef National Park, Monument Valley, and Santa Fe. The trail starts in Montana, goes south to Wyoming, then west to Idaho, south to Utah, east to New Mexico, and back north to Montana.

Come face to face with some monumental f...  
in the glory of "Big Country" on this legend.

**Premium Experiences & Dining:** Yellows concentration of spouting geysers, hot spring water, and scenic views. Relive Custer's last stand at Little Bighorn Battlefield National Monument. Learn about the Gold Rush and the town's notable Deadwood Tour. Visit historic Fort Laramie, the colourful pageant of the west and the state capital. Choose from a selection of your tour at a lively Celebration Dinner s...

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WILSON JAMES DUN

**DAY 10 CALGARY:**

As before to maintain the stampede grounds, Myke and Ropes Square will be totally of Western influence and fun. This afternoon, use the Stampede grounds to look for the world-class HCCO action. Top professionals take on the West's skilled horses. You'll also enjoy riding the Stampede and the fun of bull riding (B).

**DAY 11 CALGARY:**

The visitors only will be provided with guests attending an individual exhibition. Numbers are provided in Calgary International Agency (B).

**TOURS OF CAN AND CSE DATES & PRICES**

**PRICES PER PERSON**

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# THE WEST

Optionals Gallery Prices & Dates

Come face to face with some monumental f in the glory of "Big Country" on this legend.

**Premium Experiences & Dining:** Yellow concentration of spouting geysers, hot April a local guide for an informative walk through winning Buffalo Bill Historical Center, know firearms and natural history. Relive Custer learn all about Sitting Bull, Crazy Horse and West figures such as Wild Bill Hickok and C about the Gold Rush and the town's notable Deadwood Tour. Visit historic Fort Laramie, the colourful pageant of the west and the s northern plains. Choose from a selection of your tour at a lively Celebration Dinner v

Yellowstone geysir

Yellowstone

Bison på vandring

Jackson Hole

Reffer

## Rockies med Yellowstone og Glacier nasjonalpark

15 dager/14 netter

Denne reisen tar deg gjennom noen av de fineste nasjonalparkene i USA, Rocky Mountains, ubæret natur, dyreliv, cowboybyer og to av USAs fineste storbyer – Denver og Seattle. Du bor i nasjonalparkene Yellowstone, Glacier og Mt. Rainier og på veien steder du helt sikkert vil trives. På første hotell får du uløst en informasjonspakke med ruteplanlegger, storer å se etc. Anreiseringsgebyr i Seattle for tillate er ca \$300, og betales i USA. Turen kan også gjenn i motsatt retning og om du ønsker å legge til noen dager er det bare å gi beskjed så skreddersyr vi det. Dag til dag beskrivelse finner du på våre websteder. Denne turen kan også gjennomføres med bobel på forepørsel.

Dag	Fra	Til	Km
1	Ankomst Denver		
2	Denver		
3	Denver	Rocky Mountain National Park	126
4	Rocky Mountain National Park	Steamboat Springs	307
5	Steamboat Springs	Jackson Hole	629
6	Jackson Hole	Yellowstone, Canyon Village	268
7	Yellowstone		
8	Yellowstone	Helena	342
9	Helena	Whitefish, Glacier National Park	335
10	Glacier National Park		
11	Whitefish	Coeur d'Alene	354
12	Coeur d'Alene	Mt. Rainier Park	585
13	Mt. Rainier Park	Seattle	131
14	Seattle		
15	Helena		

Antall kilometer er i luftlinje rute.

Priser pr person for informasjonspakke med ruteplanlegger og hoteller. Billette kommer i tillegg.

Priser	
Dobbeltsom	8 770
Enkeltrom	17 540
Tremannsom	6 965
Fremmannsom	4 865

Barn under 12 år gratis i foreldrenes rom/senger.

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y | Booking Conditions | Contact Us | St

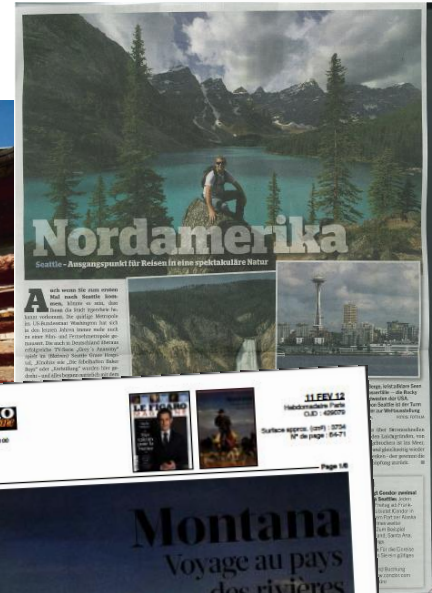
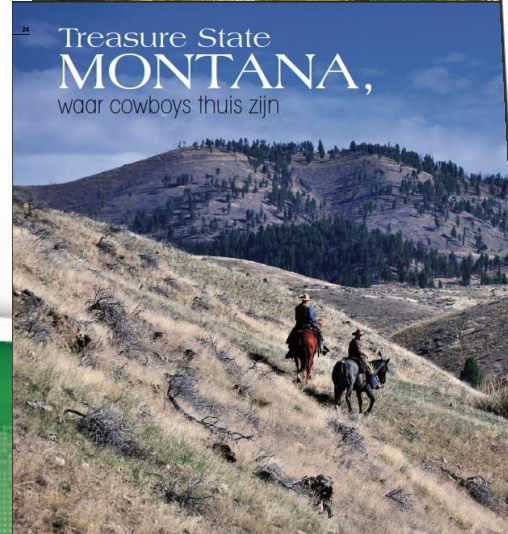
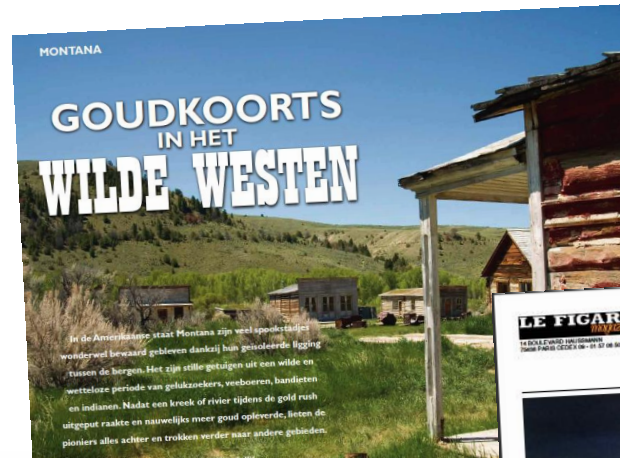
You're visiting from United States

Insight Vacations is part of The Travel Corpora  
liday and experiences of a lifetime." Copyright



# International Media FY12

- USD Ad Value  
–\$6,249,717
- Circulation  
–165,494,429



# Get Involved

- There is no membership fee thanks to the Montana Office of Tourism. Here is how you can get involved in your state and the RMI International Marketing Program
  - Online Ads: [www.RMI-RealAmerica.com](http://www.RMI-RealAmerica.com)
  - Print Ads – Real America Guide
  - RMI Roundup – Idaho in 2013
  - Translate your Website
  - Overseas Trade Shows
  - Partner with RMI
  - Host Fam Tours
  - Join RMI's Database and Mailing List
  - Trade Show Lead Follow up
  - Keep in Touch with the Montana Office of Tourism



# Contact Us



- Montana Office of Tourism

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